



BRIEFING PAPER SERIES REGIONAL DEVELOPMENT SNAPSHOT

COMMUNITY DEVELOPMENT & PLANNING DEPARTMENT NOV 2011

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EXECUTIVE SUMMARY

The City of Fairfax Planning Commission has initiated discussions regarding updating the City's Comprehensive Plan, which was adopted in 2004. During the initial stages of these discussions, a series of *Briefing Papers* will be published on matters related to planning. The topics of the papers include:

- ⇒ Comprehensive plan mechanics
- ⇒ Models of development
- ⇒ Land use and zoning
- ⇒ Regional development snapshot
- ⇒ Economic development opportunities and partnerships
- ⇒ Sustainability and the environment
- ⇒ Multimodal transportation
- ⇒ Public facilities and lands
- ⇒ Fiscal Impact Analysis
- ⇒ Census 2010 data update
- ⇒ Parking

The papers are intended to provide information that may be useful as the process to update the Comprehensive Plan moves forward. The papers will explore the aforementioned topics in detail, providing both a local perspective and examples of best practices that may be applicable to the City of Fairfax. In addition, the papers will provide context for the discussion by providing background information and, when applicable, a glossary of terms.

Centrally located in Northern Virginia, at the crossroads of several thoroughfares and within a short distance of many of the area's major growth areas, the City of Fairfax is woven into the structure of a much larger region. In charting a path for the City's future, it is helpful to consider what is occurring in nearby areas – specifically the City's two neighbors, George Mason University and Fairfax County. This briefing paper overviews some of the major items regarding current and future development in the City's immediate vicinity.

INTRODUCTION

In order to assess the City's relationship to the greater Northern Virginia region, this paper examines regional trends in retail and office sectors, summarizes the region's demographic profile, examines the long-range planning efforts of neighboring areas, and looks at several incipient developments that will likely impact Fairfax in the coming years.

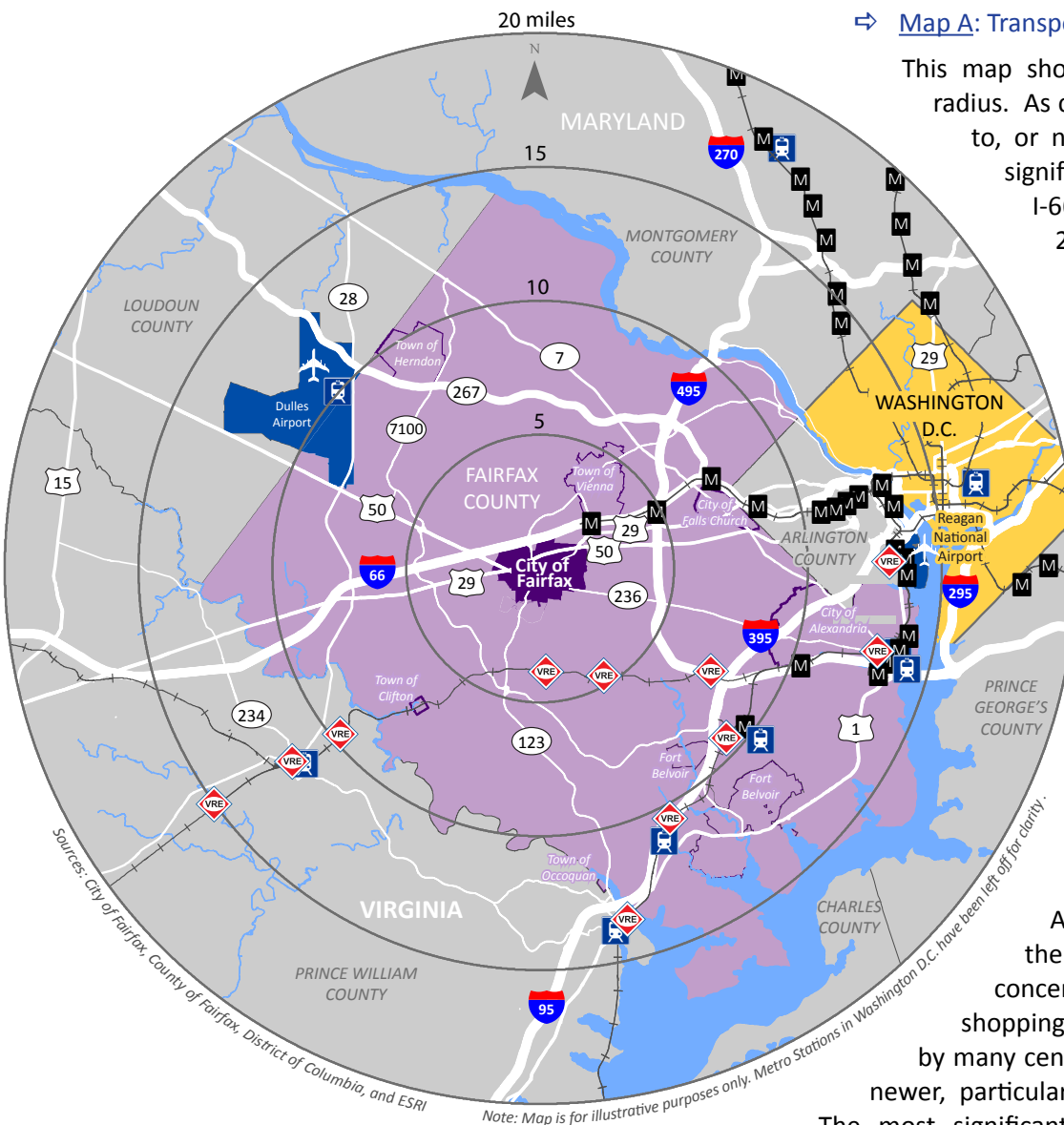
BACKGROUND

The City of Fairfax occupies 6.3 square miles near the geographical center of Fairfax County. Situated in a central location within fast-growing Northern Virginia, Fairfax has an outsized influence on the region's economic and transportation infrastructure. While containing only one percent of Northern Virginia's population, the City of Fairfax accounts for more than twice that proportion in terms of retail activity (2.6% of taxable sales) and office space (2.4% of rentable office space).

CITY AND SURROUNDING AREA EXISTING CONDITIONS

Maps A, B, C, D and E illustrate how the City of Fairfax fits into its regional framework.

MAP A: TRANSPORTATION



⇒ Map A: Transportation

This map shows the City and a 20-mile radius. As can be seen, the City is home to, or nearby many of the region's significant thoroughfares, such as I-66, Fairfax Boulevard (Routes 29 & 50), Main Street (Rte. 236) and Chain Bridge Rd. (Rte. 123)

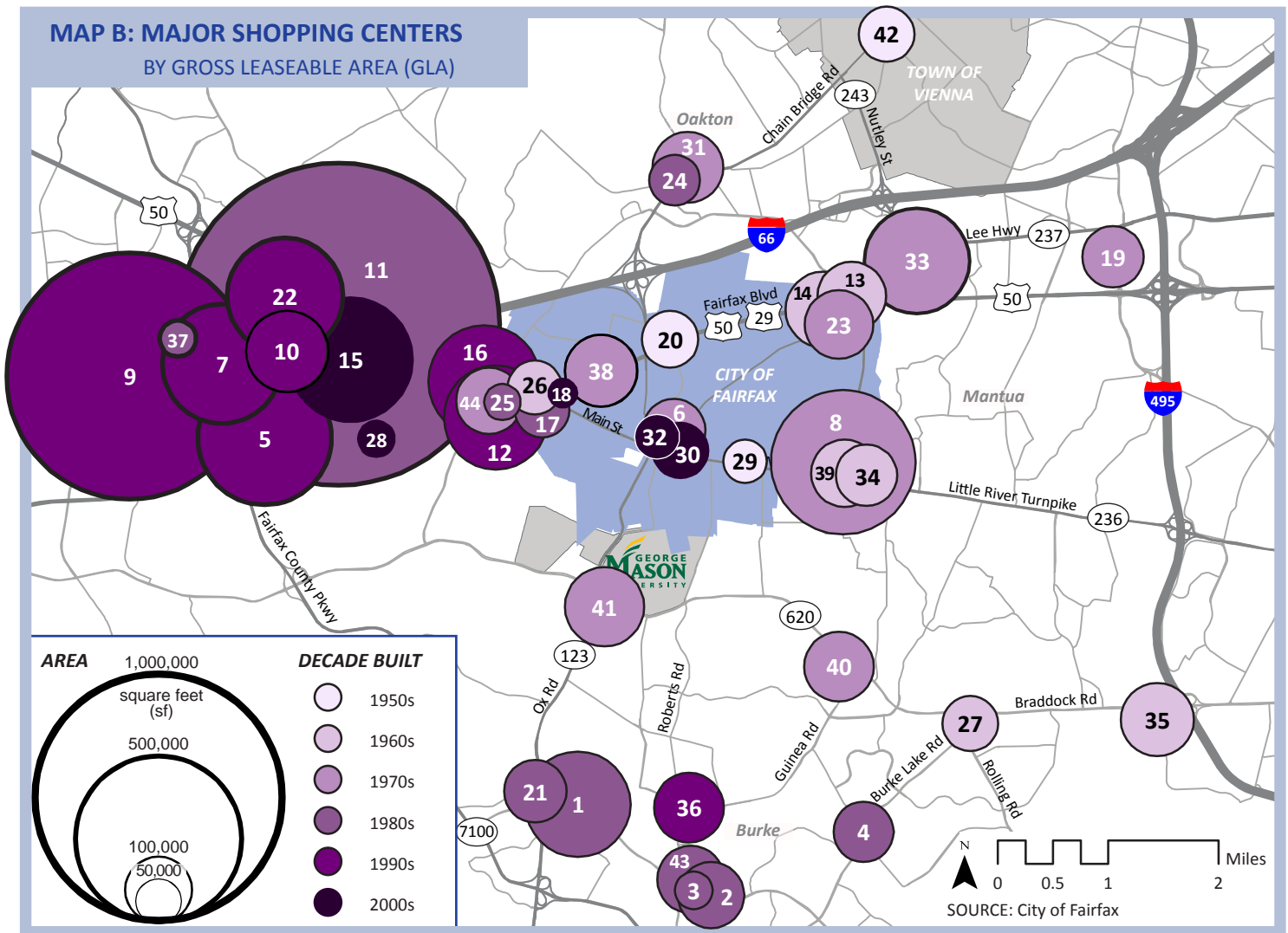
⇒ Map B: Major Shopping Centers

The City is home to 3.3 million square feet of retail space, however that accounts for only a portion of the retail offerings that are convenient to area households. Map B shows the locations of major shopping centers, as well as their gross leasable area and decade built, within 4 miles of the City.

As shown on the map, while the City of Fairfax has a sizable concentration of retail activity in shopping centers, the City is bordered by many centers that are both larger and newer, particularly to the west of the City. The most significant retail construction within

MAP B: MAJOR SHOPPING CENTERS

BY GROSS LEASEABLE AREA (GLA)



- | | | |
|---|------------------------------------|--------------------------------|
| 1 BURKE CENTRE | 16 FAIRFAX COURT | 31 OAKTON SHOPPING CENTER |
| 2 BURKE CENTRE SHOPPING CENTER | 17 FAIRFAX JUNCTION | 32 OLD TOWN PLAZA |
| 3 BURKE TOWN CENTER | 18 FAIRFAX MARKETPLACE | 33 PAN AM SHOPPING CENTER |
| 4 BURKE VILLAGE CENTER SHOPPING CENTER | 19 FAIRFAX PLAZA SHOPPING CENTER | 34 PICKETT SHOPPING CENTER |
| 5 COSTCO PLAZA | 20 FAIRFAX SHOPPING CENTER | 35 RAVENSWORTH SHOPPING CENTER |
| 6 COURTHOUSE PLAZA SHOPPING CENTER | 21 FAIRFAX STATION SQUARE | 36 TARGET - BURKE |
| 7 EAST MARKET AT FAIR LAKES | 22 FAIRFAX TOWNE CENTER | 37 THE SHOPPES AT FAIR LAKES |
| 8 FAIR CITY MALL SHOPPING CENTER | 23 HOME DEPOT | 38 THE SHOPS AT FAIRFAX |
| 9 FAIR LAKES CENTER | 24 HUNTER MILL PLAZA | 39 TURNPIKE SHOPPING CENTER |
| 10 FAIR LAKES PROMENADE | 25 JERMANTOWN SQUARE | 40 TWINBROOKE CENTRE |
| 11 FAIR OAKS MALL | 26 KAMP WASHINGTON SHOPPING CENTER | 41 UNIVERSITY MALL |
| 12 FAIRFAX CENTRE | 27 KINGS PARK SHOPPING CENTER | 42 VIENNA SHOPPING CENTER |
| 13 FAIRFAX CIRCLE PLAZA SHOPPING CENTER | 28 LEE PLAZA | 43 WALMART (BURKE) |
| 14 FAIRFAX CIRCLE SHOPPING CENTER | 29 MAIN STREET CENTER | 44 WEST FAIRFAX CENTRE |
| 15 FAIRFAX CORNER | 30 MAIN STREET MARKETPLACE | |

the central Fairfax County area in the past 20 years has occurred in the Fair Lakes/Government Center area, which is close enough to the City to be direct competition to many City shopping areas.

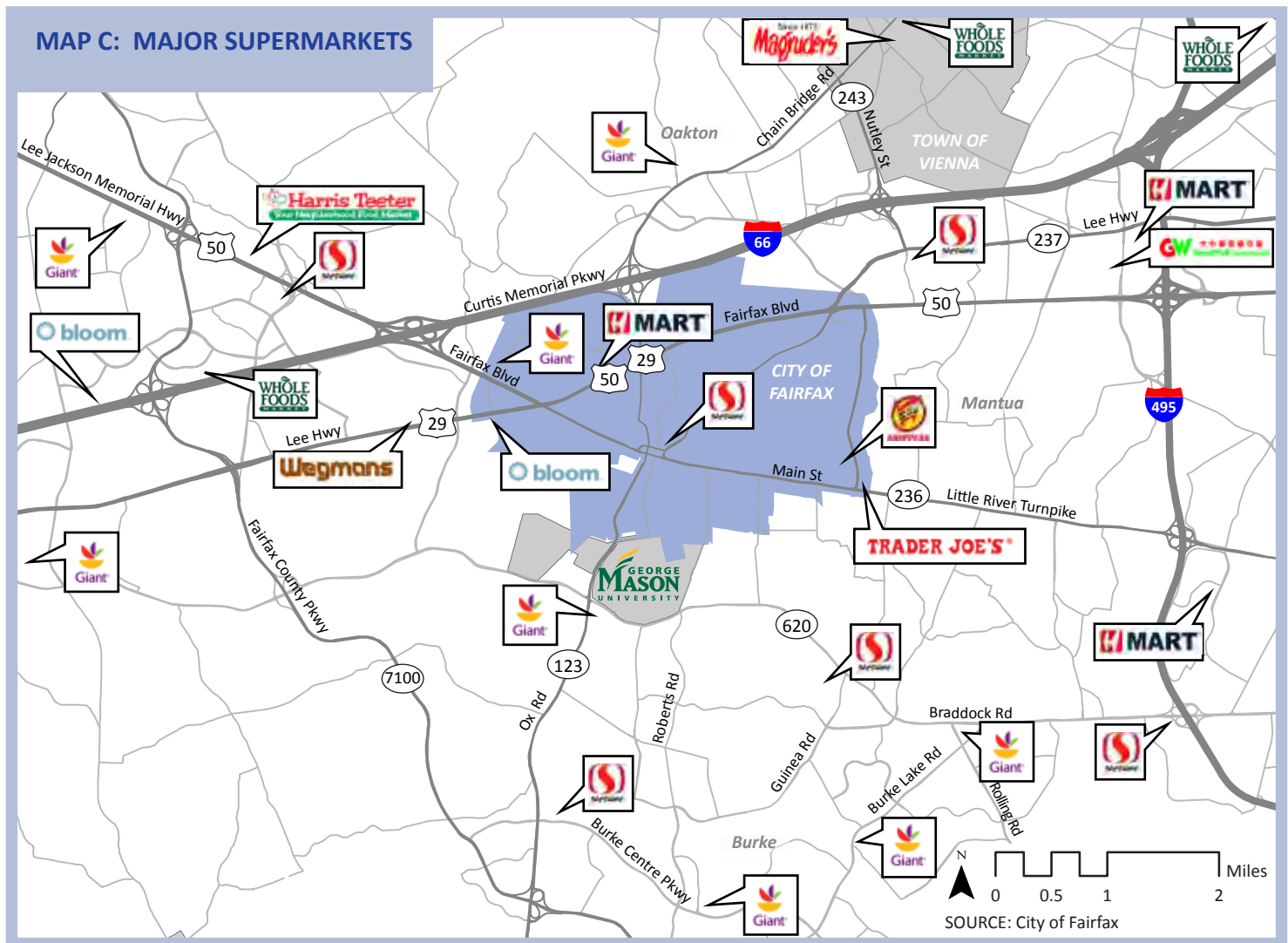
Furthermore, several of the existing shopping areas that are close to the City, such as the University Mall and Fair Oaks Mall, are planned for major short- to medium-term renovations, adding still more upgraded retail inventory to the City's immediate surroundings.

The presence of newer and upgraded retail venues within the City would help to ensure regional competitiveness in the coming decades, and to help keep the City's status as a destination for retail and restaurant offerings.

⇒ [Map C: Major Supermarkets](#)

As a retail sector that is distinct, this map highlights major supermarkets within the same area as Map B.

The City of Fairfax contains five major supermarkets (Giant, Safeway, Shoppers Food Warehouse, Super H Mart, and Trader Joe's), yet as shown on the map, many newer, larger and/or upscale supermarkets are located to the City's west. These newer markets include Wegmans, Harris Teeter, Whole Foods and others. Further affecting the City's supermarket situation is that two markets within the City (Giant at Turnpike Shopping Center and Harris-Teeter at Main Street Marketplace) closed within the past five years.



While a typical supermarket may have an approximately three-mile primary trade area radius (the area from which the majority of a store's customers originate), City residents in search of supermarkets with modern amenities of upscale offerings may need to bypass the City's own markets and instead travel to the newer stores to the west.

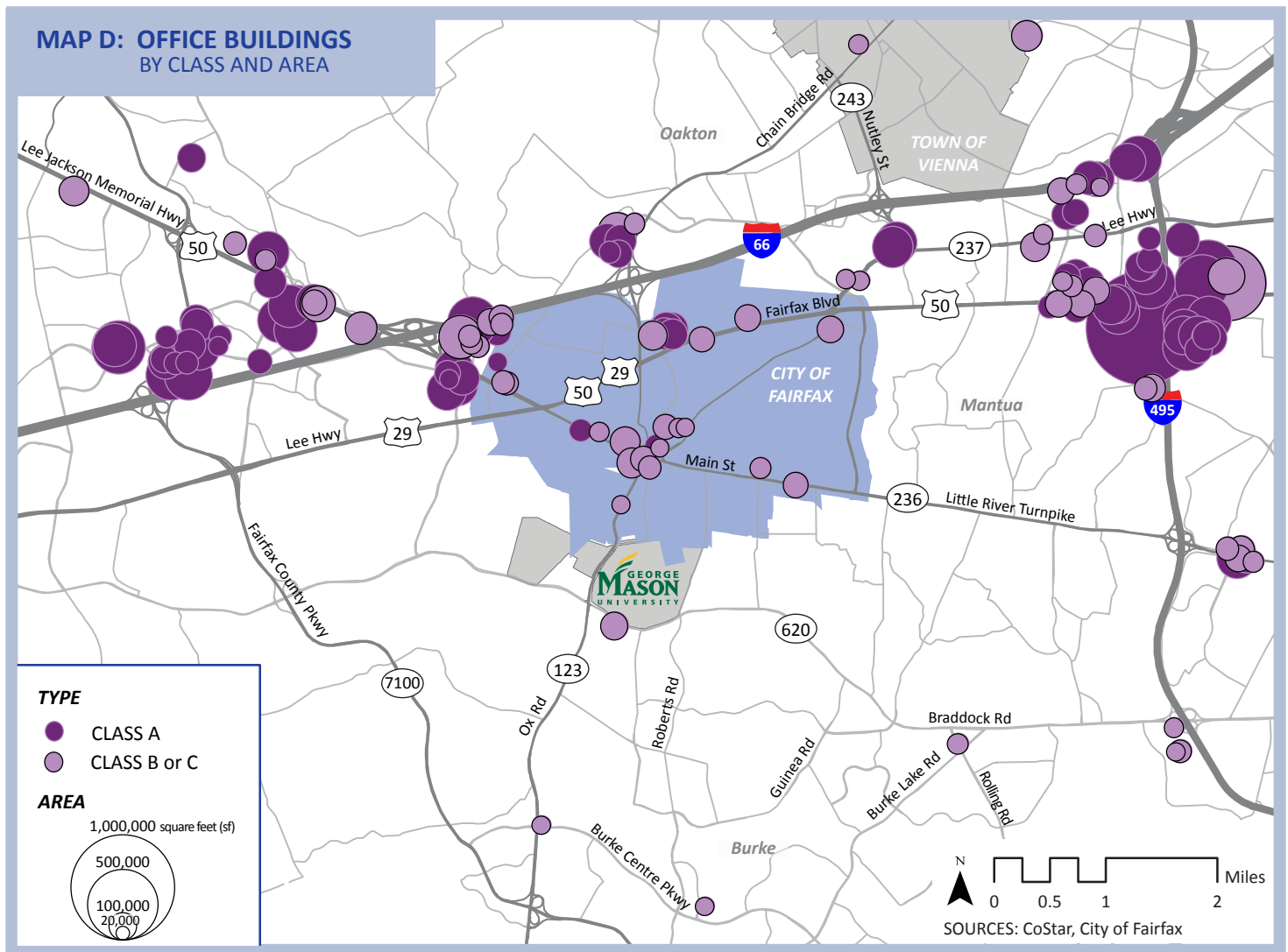
⇒ [Maps D and E: Office Buildings](#)

The City of Fairfax contains 4.7 million square feet of commercial office space, with 200 buildings (including 13 with over 75,000 sq. ft.) of leasable space.

While the City of Fairfax contains considerable amounts of office space, most of it is in Class B

buildings, and few major office buildings are newer than twenty years old. The relative lack of Class A space has long been identified as a priority economic development item, and [Chart A](#) shows the City's total proportion of Class A space in relation to a similar measurement of Fairfax County's office space. At 22%, the City's proportion of Class A space is far less than the 64% in Fairfax County, or the 53% in Central Fairfax County.

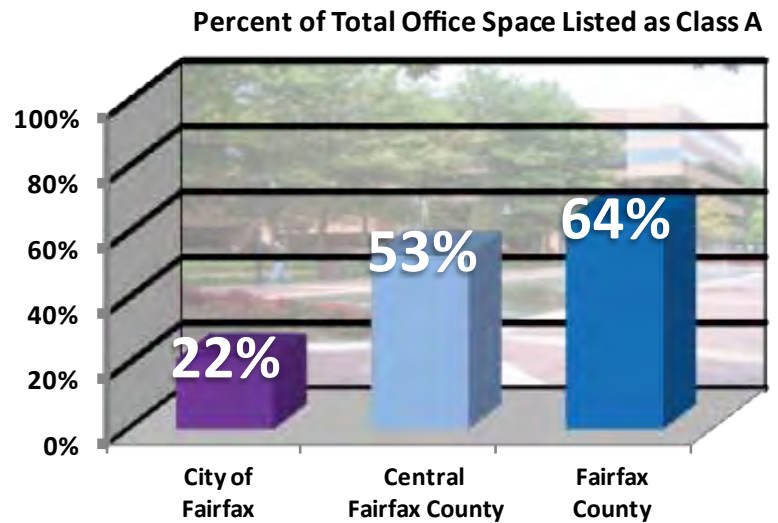
Additionally, most recent office building development in the Central Fairfax area has occurred outside of the City's limits – particularly at the Government Center/Fair Lakes and Merrifield/Annandale areas.



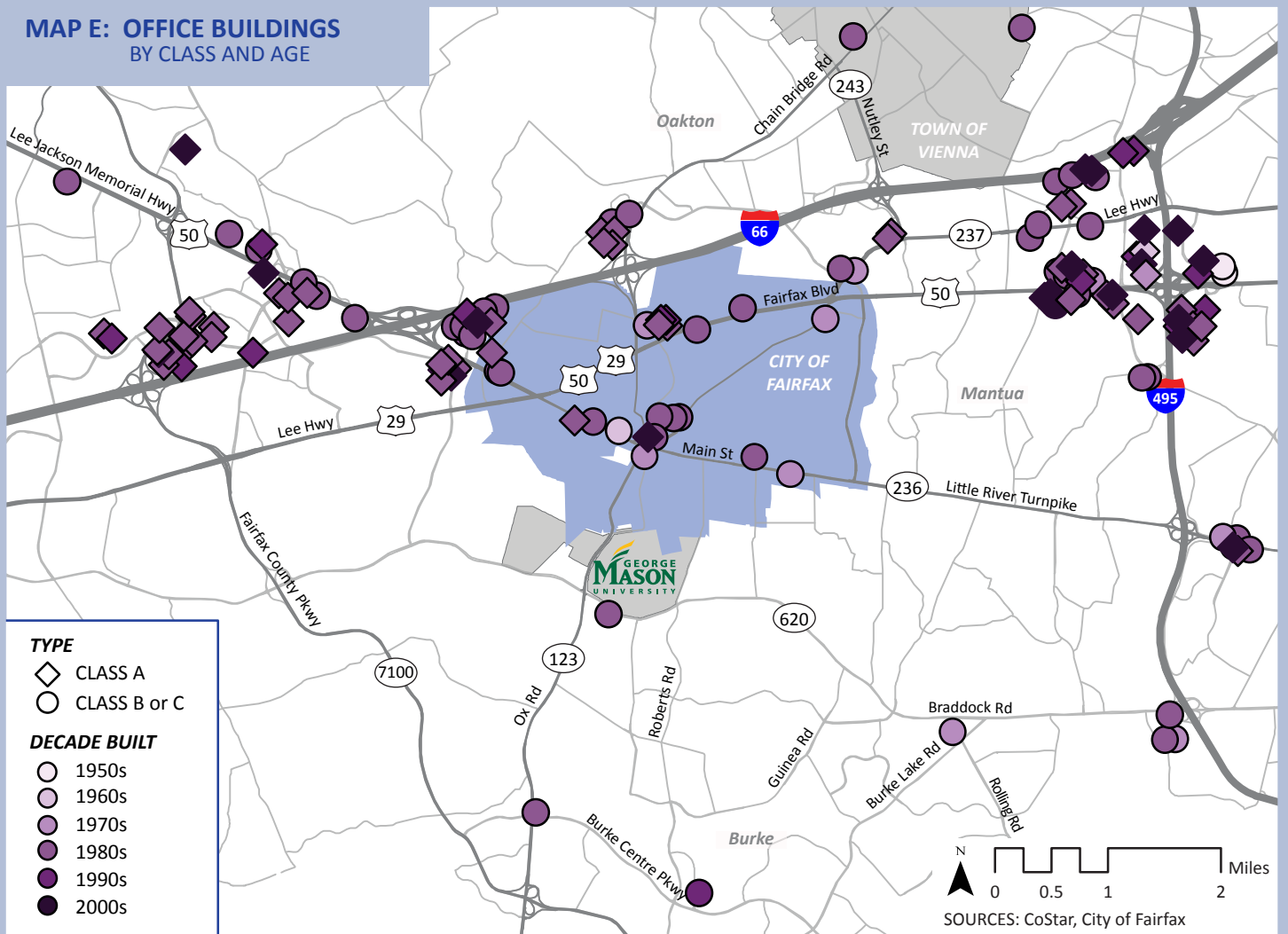
Note: Includes office buildings with over 50,000 sq. ft. of rentable building area. Does not include most commercial condominiums.

CHART A: CLASS A OFFICE SPACE

The City's inventory of Class A space is clustered in a few buildings, notably the four-building WillowWood Plaza complex. Meanwhile, large clusters of Class A space exist both to the east of the City (in the Merrifield area) and to the west (in the Government Center area). The current Comprehensive Plan acknowledges the City's need to pursue Class A office space, and that need will likely intensify once the national economy recovers from the current recession and demand increases for quality office space.



Source: City of Fairfax

MAP E: OFFICE BUILDINGS
BY CLASS AND AGE

Note: Includes office buildings with over 50,000 sq. ft. of rentable building area. Does not include most commercial condominiums.

REGIONAL TRENDS

The past several years have seen marked changes from the rest of the preceding decade in terms of demand for commercial buildings, as both the public and private sectors have felt profound impacts from national economic events. The following section briefly highlights some regionwide measurements of recent activity as well as forecasts, derived from data collected by the Metropolitan Washington Council of Governments.

COMMERCIAL CONSTRUCTION

Throughout the Washington Metropolitan region, the amount of new construction – whether residential, commercial, or public sector – declined precipitously since the building-boom years of 2006-08. In 2009, the square footage of new commercial construction starts declined by more than 60 percent from the previous year. Although the amount of regional construction rose from 2009 to 2010, it is unclear at this time whether that indicates the start of a sustained economic upswing.

Although the recent regionwide decline in construction starts has been dramatic, one can see by looking at a 30-year pattern of construction activity that such declines tend to occur periodically in the Capital region, as the economy and federal expenditures both rise and fall. Even so, the current downturn is particularly acute, representing the region's lowest level of new commercial construction activity since 1980.

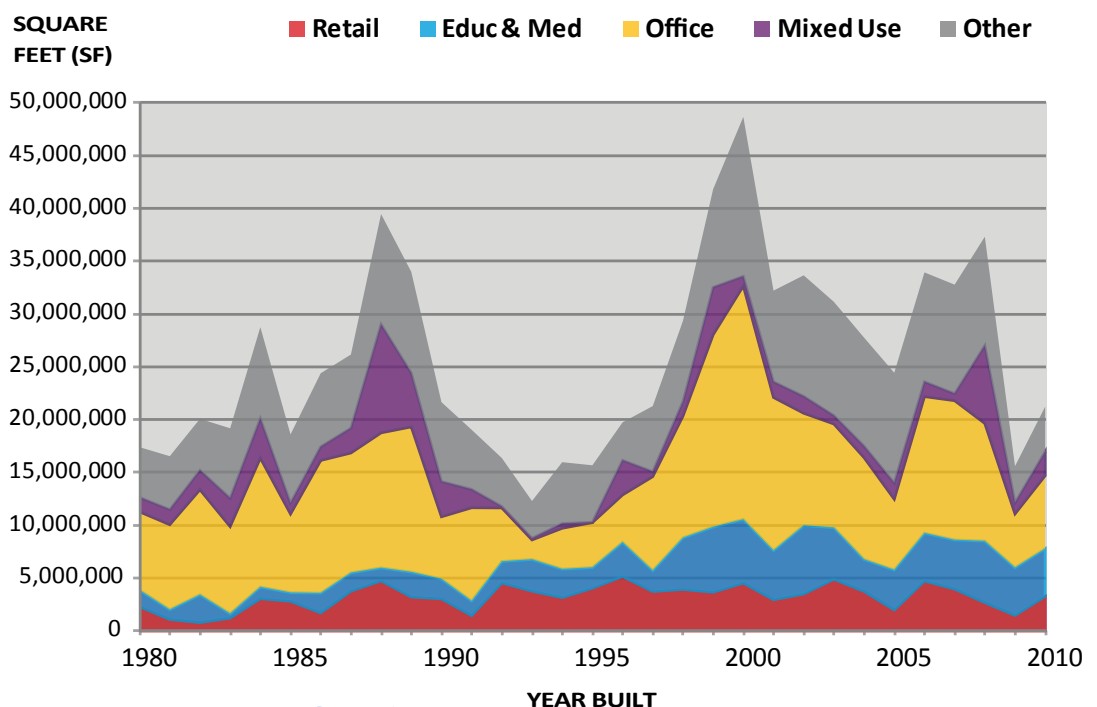
In 2010 (the last year for which full data are available), office space represented the largest segment of the new construction, at 33 percent, which is slightly lower than the 1980-2009 period average of 37 percent. The biggest proportional increase in the 2010

statistics was from the educational and medical category, which accounted for 21 percent of new square footage in 2010, up significantly from the 1980-2009 average of 12 percent. Conversely, the "Other" category, which includes government facilities, accounted for just 12 percent of new square footage in 2010, down significantly from the 1980-2009 average of 23 percent.

The City's economy generally mirrors that of the region, however it should be noted that the boom in office construction shown on Chart B that occurred in the late 1990s and early 2000s largely bypassed the City, with Northern Virginia office projects of that period directed largely to the Dulles Corridor and other areas to the City's west.

It is important to keep in mind, however, that construction amounts in the Washington region are historically cyclical in nature. Chart B below illustrates the square footage of new construction in major categories throughout the Capital region over the past three decades. As indicated in the chart, the region has witnessed other recessions where the quantity of new construction dropped dramatically. Still, the region's economic resiliency has helped the demand for new buildings to bounce back in the post-recession periods.

CHART B: NEW CONSTRUCTION, GREATER WASHINGTON REGION



Source: Metropolitan Washington Council of Governments.

REGIONAL DEMOGRAPHICS

Northern Virginia is a fast-growing region, and one in which demographics change rapidly. The City of Fairfax is no exception, and the City has – along with most of the surrounding region – become considerably more diverse in the last several decades. The overall Northern Virginia region – containing over 2.2 million people grew by 22 percent between 2000 and 2010. Leading the jurisdictions with the highest growth rates were Loudoun County (84%) and Prince William County (43%), as those more outlying areas added thousands of new housing units over the decade. Jurisdictions closer to the nation's capital saw smaller, but still significant, growth, such as Fairfax County (12%), Arlington County (10%) and Alexandria (9%). The City of Fairfax experienced a 5% growth rate over the same period.

Throughout the region, jurisdictions have grown more ethnically diverse, with 45 percent of the region's population being non-white as of 2010. Regionwide, the largest minority group is Hispanic, accounting for 16 percent of the region's population, followed by Asian (14%) and Black (11%).

When compared to regional averages, the City of Fairfax deviates most from the regional average when it comes to age. The City tends to have a higher proportion of older residents – and a lower proportion of children – than does

the region as a whole. 13.7 percent of the City's population is over age 65, compared to 8.6 percent throughout Northern Virginia. At the other end of the age spectrum, 20.4 percent of the City is under 18, a lower percentage than the 24.8 percent seen regionally. This is illustrated in Chart C, which shows 18 age groups, and how the City compares to the Northern Virginia average in terms of population proportion.

REGIONAL FORECASTS

The Council of Governments periodically publishes long-range population and employment forecasts. The most recent forecast, stretching to 2040, estimates that the region's employment will grow 47 percent to 4.5 million jobs.

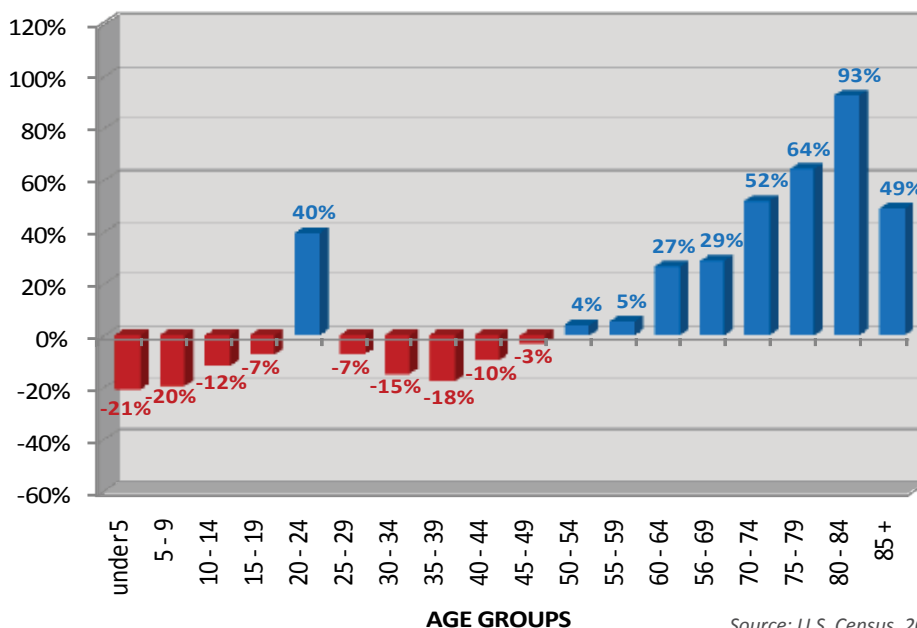
The strongest period of growth is forecast to be between 2015 and 2020, when the region is projected to add 56,000 net new jobs annually. Two-thirds of all jobs forecast for the Washington region are anticipated to be in the service sectors (business services, computers, government contracting, healthcare, etc.).

Over the 2005-2040 period (as measured by the report), employment in the City of Fairfax is forecast to increase by 44 percent, or over 11,000 jobs – at roughly the same rate as other “inner suburb” jurisdictions such as Fairfax County and Montgomery County, Md. Generally, the outer suburbs (Loudoun, Prince William, etc.) are forecast to grow at a faster pace, while Washington, D.C., the region's largest employment location, is expected to grow more slowly.

In terms of population, the Greater Washington region is forecast to grow by 36 percent, as well as by 41 percent in terms of the number of households. Similar to the employment forecasts, the strongest growth is foreseen in the outer suburbs. The City of Fairfax is anticipated grow by 30 percent in population and 33 percent in households by 2040.

CHART C: CITY OF FAIRFAX POPULATION - 2010

**% IN COMPARISON
TO REGION**



Source: U.S. Census, 2010

Both the employment and populations projections from the Council of Governments are based on statistics gathered prior to the 2010 Census. The COG, in collaboration with its local jurisdictions, is planning to update both sets of projections in the near future to align the base year with 2010 Census figures.

SURROUNDING AREAS' PLANS

The City does not exist or function in isolation, and can be heavily impacted by decisions that are made for areas beyond its jurisdictional control. Therefore it is helpful to understand the long-range planning goals for nearby areas, namely Fairfax County and George Mason University.

FAIRFAX COUNTY COMPREHENSIVE PLANS

The Fairfax County Comprehensive Plan consists of four Area Plans, each encompassing several Planning Districts. The City of Fairfax is surrounded by the Fairfax and Vienna Planning Districts of Planning Area II. The Comprehensive Plan for this area – first drafted in 1990 and updated in 2010 – contains numerous items that are relevant to the City's growth and development. Although the descriptions of some planning items have not been updated to reflect current conditions or new developments, the County's Plans do give indications as to policies and some specific improvements favored by the County administration.

The majority of the County's Fairfax and Vienna Planning Districts is residential, and the Comprehensive Plan envisions these areas remaining residential, with some mixed-use redevelopment in places such as Merrifield, the Flint Hill business area (along Chain Bridge Rd. just north of I-66), and the MetroWest complex. Portions of the envisioned Merrifield and MetroWest projects are currently under construction.

Specific items addressed in the County's Comprehensive Plan for areas surrounding the City include the following:

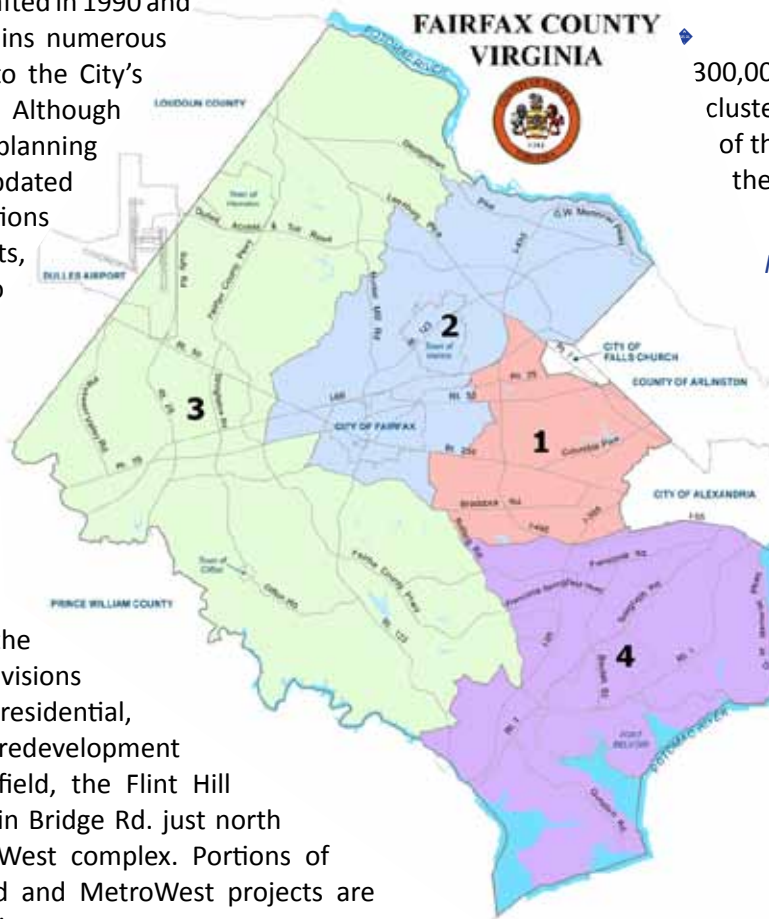
Transportation

⇒ **Vienna Transit Station Area:** Intense development planned for the "Vienna Transit Station Area," which covers the east side of Nutley St. on both sides of I-66. This area extends to the MetroWest development – the closest portion of the Station Area to the City limits – currently under construction on the north side of Lee Highway less than one mile northeast of Fairfax Circle. While the Comprehensive Plan does not contain extensive detail of the development types or intensity foreseen for this portion of the County, the current MetroWest site plan contains the following within its 55 acres:

◆ **Residential:** 2,248 housing units, mostly high-rise apartments and condominiums, but also including mid-rise apartments, as well as townhouses.

◆ **Office:** Approximately 300,000 sq. ft. of office space, all clustered in the northern part of the development closest to the Metrorail station.

◆ **Retail / Restaurant:** Approximately 190,000 sq. ft. of retail/restaurant space, mostly lining MetroWest's main thoroughfare as ground-floor tenants within the high-rise residential and office buildings. The retail and restaurant uses are envisioned as primarily serving the development's local residents and employees, rather than being a major draw for customers arriving from other parts of the region.



Source: Fairfax County GIS and Mapping Services, dated 2007



Source: Fairfax County Comprehensive Plan, 2011 Edition Policy Plan, Transportation

MetroWest is the largest planned development close to the City, and as such it will likely have some impact on the City's commercial trade area. It will also add retail demand from the 2,000+ households that are anticipated for the development at build-out as well as traffic volume to intersections in the City that are nearby the planned development.

⇒ **Future Interchanges:** The County's Comprehensive Plan recommends future interchanges at certain existing at-grade intersections, some of which are just outside city limits. These include:

- ◆ Braddock Road and Ox Road (Rte. 123)
- ◆ Lee Highway and Blake Lane
- ◆ Chain Bridge Road and Blake Lane/Jermantown Road

The Fairfax County Comprehensive Plan recommends the best option for alleviating congestion to be the construction of interchanges. Although all three selected intersections are proximate to City

boundaries, no City properties would be directly impacted in terms of right-of-way acquisition or property accessibility.

⇒ **Potential Metrorail Expansion:** The Comprehensive Plan acknowledges the potential future expansion of Metrorail west of its current Vienna terminus, and recommends a future station between the current Vienna/Fairfax-GMU station and the Fair Oaks Mall area that will likely receive multiple stations in the event that the rail system is expanded). There is no further detail as to where such future Metrorail stations along the I-66 corridor may be located.

Land Use

⇒ **School Street Area:** The plan for the area surrounding School Street and George Mason University has not been updated to reflect current conditions (i.e., completed George Mason Blvd., Fairfax Gateway subdivision, and GMU Hotel), but generally the Plan presents an option of residential development at 12 to 16 units per acre, depending on certain conditions being met.

The County's plans for this immediate area are more pertinent regarding the former Eleven Oaks School site, the majority of which lies within the County. The Plan states that the Eleven Oaks site "may be appropriate for mixed-use with a residential component at 12-15" dwelling units per acre, given a set of detailed conditions to be met. Future development on this site will need to be mindful of the intent of the County's Comprehensive Plan.

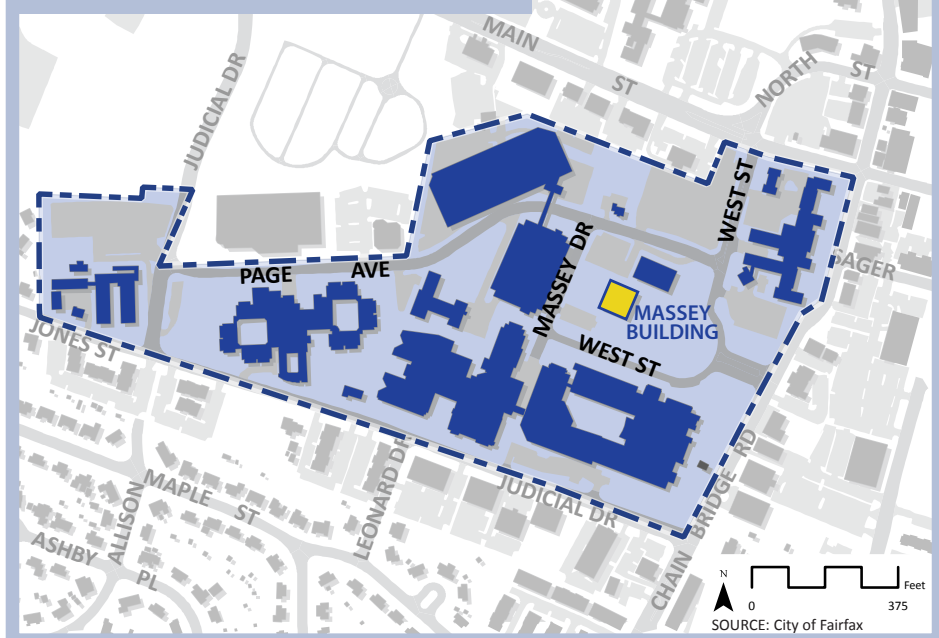
⇒ **Preserving Residential Character:** As noted above, the majority of land contained in the planning districts immediately surrounding the City is residential in character, consisting of established, mostly single-family, residential neighborhoods. The Plan calls for limiting commercial encroachment into these established neighborhoods, and preserving the existing residential character.

⇒ **Coordination with George Mason:** Although George Mason University's campus is within Fairfax County, the County does not have direct control over GMU's planning or development efforts. However, as one of the County's largest institutions, the County has a great deal of interest in ensuring compatibility with the university's future development and expansion plans. Therefore, the Comprehensive Plan calls

for coordination with GMU on development matters in order to achieve continued compatibility with surrounding areas.

Fairfax County's comprehensive planning strategy for the area surrounding the City is one of maintaining the existing character, while making development and transportation improvements in select areas where those improvements could be made in concert with the surrounding neighborhoods. Generally, the County's overall planning strategy for this area is in harmony with the City's own goals of maintaining a residential character while taking advantage of new development and transportation opportunities.

MAP F: JUDICIAL CENTER COMPLEX



FAIRFAX COUNTY CAPITAL IMPROVEMENTS

Fairfax County's 2011-2015 Capital Improvement Program (CIP) includes several items that are in or near the City of Fairfax. These items are at a more advanced stage of planning or completion than are the items only listed in the County's Comprehensive Plan, which may be longer-term in nature.

CIP items of relevance to the City are presented in the table below, providing a brief description of the item and location, a general timetable for the project, and the cost attributed to the project in the CIP.

The most significant single item is the proposed demolition of the 12-story Massey Building. While this item is in the early planning stages, and details were not available for inclusion in the CIP, current plans call for the current public safety occupants of the building – all County public safety agencies – to be relocated to a new building to be built off Monument Drive near the County's existing administrative headquarters. If a bond referendum for the new building is approved, County staff anticipate the personnel move to occur by 2015. After that point, the County intends to demolish the Massey Building, but presently there are no firm plans regarding what, if anything, will be built in its place.

TABLE A: SELECT FAIRFAX COUNTY CAPITAL IMPROVEMENT PROGRAM ITEMS

Capital Improvement Program (CIP) Item	Location	Timetable	Cost
Olley Glen (90 unit senior affordable housing)	Rte 236 & Olley Ln	5-year	\$19 million
Providence District Community Center	MetroWest	5-year	\$13 million
Route 29 Widening (Centreville to Fairfax City)	W of City	5-year	\$7 million
County Health Lab Relocation	Belle Willard	5-year	\$6 million
Less Secure Shelter II	Court Complex	5-year	\$7 million
Historic Courthouse Renovation - Phase II	Court Complex	Future	\$8 million
Historic Courthouse landscaping/walls & sidewalks	Court Complex	Future	\$3 million
ADC Pre-Release Center Renovation	Court Complex	Long Term	\$10 million
Demolition of Massey Building	Court Complex	Long Term	

GEORGE MASON UNIVERSITY

As the City's southern neighbor, George Mason University (GMU) – with its 26,000 students, 2,500 employees, and 2.5 million square feet of building space – has a large influence on the City. The campus consists of nearly 100 buildings, and includes not only classrooms and administrative space, but also dormitories and regional cultural and entertainment venues such as the Patriot Center and the Center for the Arts.

With such an influential institution adjoining the City's boundaries, it is helpful to understand how the University intends to grow in the coming years. GMU has already changed significantly since the Fairfax Campus first opened its doors in 1964. Starting with four buildings and 356 students, the college over the years has added students, programs and facilities, and is now one of the largest educational institutions in the state.

While the majority of the George Mason campus is located immediately outside of the City's boundaries, the University does own a few properties within the City, including an office building on University Drive and a townhouse complex on Chain Bridge Road. The University also leases various spaces in the City for administration or educational functions.

George Mason University's Long-range Plans

George Mason University has a campus Master Plan, along with a recently-updated Transportation Plan. These documents, along with a Space Needs Analysis, help illustrate the University's priorities regarding the extent and type of its future facilities growth, and provide guidance for the physical development of George Mason's 677-acre campus.

The tenets of GMU's long-range plans are generally similar to those advocated by the City for its own planning purposes – namely creating a distinctive and vibrant community feel, promoting a mix of uses on campus, and emphasizing pedestrian-friendliness. Among the major aspects of George Mason's current plan are the following:



Source: George Mason University Transportation Master Plan

- ⇒ **Compact Development at the Core:** Continue to develop a compact, higher-density core (generally considered the 117 acres within Patriot Circle), using the area outside of this core largely for ancillary functions, parking and athletics.
- ⇒ **Parking and Vehicle Accessibility Important:** While the central campus develops compactly, it is still important to keep the campus accessible to commuter students – meaning nearby parking facilities and improved ingress/egress from campus.
- ⇒ **Space Requirements:** The University currently boasts about 1.3 million sq. ft. of academic space, 1 million sq. ft. of residence space, 600,000 sq. ft. of parking garages, and 300,000 sq. ft. of athletic building space. By way of comparison, this is about two-thirds of the City of Fairfax's total office building square footage. A 2009 report estimated that by 2017 the school would need an additional 1 million sq. ft. of academic and administrative space to meet projected student enrollment increases.

⇒ **Student Housing:** Over 5,000 George Mason students live on campus, or one-third of the 16,000 full-time students at the Fairfax campus (or one-fifth of the total number of students). The Master Plan assumes the ratio of resident to commuter students will remain roughly stable in the near future – with the number of residents increasing at the same pace as the overall number of students.

⇒ **Transportation:** GMU's Transportation Master Plan (finalized in 2011) further clarifies the school's planning strategy, as transportation ties the physical development specified in the Master Plan together. This is particularly pertinent because a sizable portion of GMU traffic passes through City streets, and the City and University partner on funding for the CUE bus system. Items within the Transportation Plan that most affect the City of Fairfax include:

- ◆ **East/West Campus Connector:** The Plan advocated studying additional access options to the West Campus, particularly

an overpass over Route 123. The overpass, for which VDOT has made funds available, would connect the east and west campuses south of the Field House and north of Kelley Drive. Related roadway improvements would include extending the overpass connection to Rapidan River Road, and then south to Braddock Road. It is anticipated that the overpass and roadway improvements would relieve some pressure from the chronically congested Braddock/Route 123 intersection by diverting GMU-bound traffic to the new roadway to the north.

- ◆ **CUE Bus:** The plan calls for expansion of CUE bus operations to incorporate some functions that are presently being served by GMU shuttles.
- ◆ **Bikeways:** The Plan calls for upgraded and more delineated bicycle paths between GMU, Old Town, and the Vienna/Fairfax-GMU Metrorail station. One specific recommendation is to create a branded "Mason to Metro Trail" to make bicycle transportation easier and more intuitive.

GEORGE MASON UNIVERSITY NORTHWEST HOUSING VIIIA COMPLEX

The Northwest Housing VIIIA complex project currently under construction will add 609 beds of student housing in the northwest section of the campus near the intersection of University Drive and George Mason Boulevard. The two buildings will provide a mix of apartment-style residences with kitchens and suite-style dorms.

This is the first phase of a multi-phase development. Construction began in April 2010 and is projected to be completed in June 2012. This project was designed and is being constructed to facilitate LEED Silver certification per the U.S. Green Building Council.



Image Source: George Mason University

MAJOR NEARBY PROJECTS

Several large projects in Fairfax County are under construction or planned for the near future. These projects may have implications on the City's retail, office or housing markets, but are also instructive in gauging the health of the region's economy. Following are descriptions and the current status of several large- and small-scale projects that may impact the City's commercial or residential sectors and are currently planned for Northern Virginia areas nearby the City of Fairfax:

EAST OF THE CITY

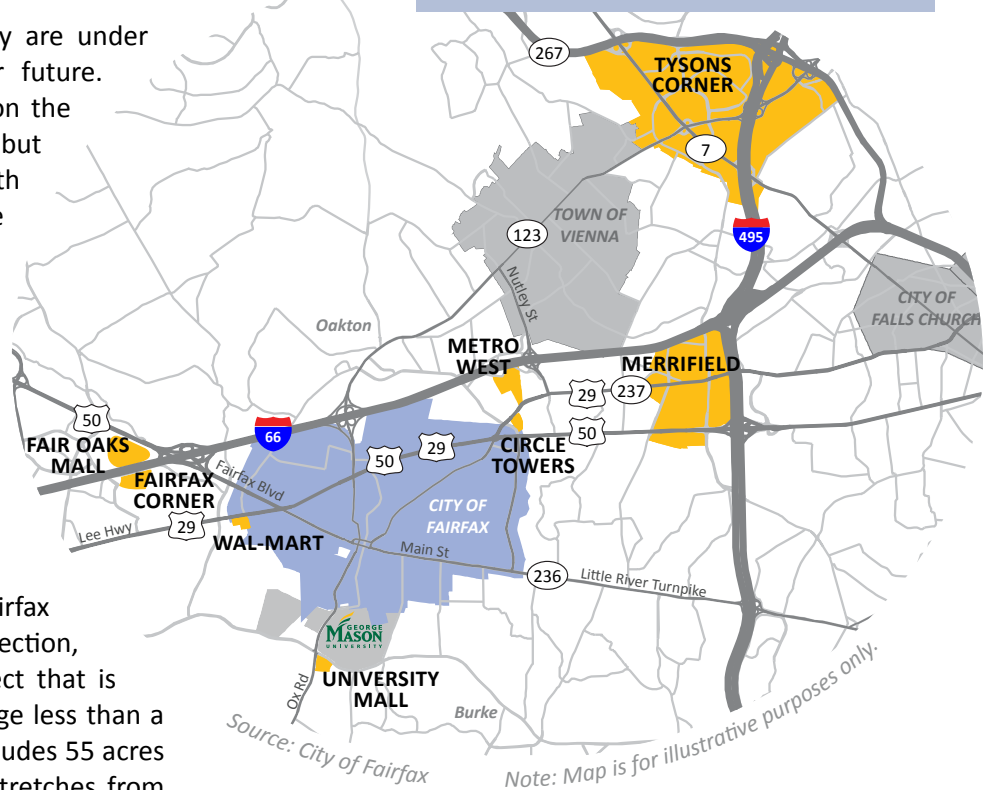
MetroWest

Also described previously in the Fairfax County Comprehensive Plans section, MetroWest is the largest current project that is close to the City – with its southern edge less than a mile from Fairfax Circle. MetroWest includes 55 acres of the former Fairlee subdivision and stretches from just south of the Vienna/Fairfax-GMU Metrorail Station south to the 9300 block of Lee Highway. MetroWest is currently under construction. The current site plan contains the following :

- ⇒ **Residential:** 2,248 housing units, mostly high-rise apartments and condominiums, but also including mid-rise apartments, as well as townhouses.
- ⇒ **Office:** Approximately 300,000 sq. ft. of office space, all clustered in the northern part of the development closest to the Metrorail station.
- ⇒ **Retail/Restaurant:** Approximately 190,000 sq. ft. of retail/restaurant space, mostly lining MetroWest's main thoroughfare as ground-floor tenants within the high-rise residential and office buildings. The retail and restaurant uses are envisioned as primarily serving the development's local residents and employees, rather than being a major draw for customers arriving from other parts of the region.

The largest single component of Fairfax County's plans for a redeveloped Vienna/Fairfax-GMU Station area, MetroWest is anticipated to come fully on line by 2014.

MAP G: MAJOR NEARBY PROJECTS



METROWEST



Merrifield Town Center

Fairfax County began a process in the early 2000s of transforming Merrifield – then a largely commercial and industrial area long slated for some form of revitalization – into a more urban environment, with high-rise office and apartment buildings and increased retail uses.

The overall Master Plan for the greater Merrifield area envisions nearly 10,000 housing units and 1 million square feet of commercial space.

Within the larger Merrifield planning area lies the Merrifield Town Center (currently marketed as the Mosaic District), generally the area along between Gallows Road and Eskridge Road, bounded on the north by Lee Highway and on the south by Luther Jackson Middle School. This area includes 31 acres and is approximately 3 miles east of the City limits. The Town Center is being designed as a high-density area, planned for a total of 1.9 million square feet of space in buildings between 75 and 115 feet in height.

The Town Center is envisioned as a mixed-use district, and the retail component is among the first to be built. As of 2011, several tenants have pre-leased space, including Target (for a 160,000 sq. ft. store), a multiplex cinema and a hotel. Once completed, the Town Center is set to include a new network of connected streets, approximately 1,000 dwelling units, 600,000 sq. ft. of retail space, an eight-screen Angelika Film Center, two parks, a 150-room Hotel Sierra, 65,000 square feet of office space and 4,000 parking spaces in four garages.

A potential grade-separated interchange at Lee Highway and Gallows Road is being considered as a part of the development project.

At about 1 mile from the Dunn Loring Metrorail Station, the Merrifield Town Center will not be dependant on rail patrons. Instead, the retail component is envisioned to draw customers from nearby apartments and from drive-in traffic – the project will have about 4,000 commercial parking spaces, and 1,800 residential spaces, all contained in parking structures.

Circle Towers Redevelopment

Just northeast of the City limits, the 19-acre Circle Towers development has been a fixture in the Fairfax Circle area since the complex was built in 1972. A mixture of high-rises, townhouses and offices, the complex currently has a dated appearance and its somewhat cloistered site layout makes the retail and office uses less visible from the street.

MERRIFIELD/ MOSAIC DISTRICT



Images © 2010 Mosaic District



In November 2010, the 31 acre town center referred to as the Mosaic District received Silver Certification as a LEED for Neighborhood Development Pilot Project from the U.S. Green Building Council.

Fairfax County recently approved a major redevelopment for the complex that would consist of a thorough architectural reworking of the entire site, plus the addition of over 100 housing units, new retail uses, and a new office building.

The three high-rise (12- to 14-story) apartment buildings will remain intact after the renovation, however the existing 52 townhouses will be demolished. Their location in the center of the development will be replaced by new five-story apartment building with ground-floor retail uses. Additionally, retail uses will be added to ground floor of one of the towers facing Lee Highway, and an additional office building is to be constructed behind the existing freestanding office building. The site will also feature an additional entrance off of Blake Lane, as well as pedestrian improvements, particularly to ease residents' access to the Vienna/Fairfax-GMU Metrorail station.

This redevelopment action, while only an incremental change to the total size of the Circle Towers development, is significant to the City due to its proximity and the addition of higher-quality residential and commercial products in a location within the City's trade area.

WEST OF THE CITY

Fairfax Centre Wal-Mart

On the western boundary of the City, a small shopping center is currently being retrofitted to accommodate a new tenant, a Wal-Mart store.

The shopping center, the Fairfax Centre II on Lee Highway, formerly contained a Home Depot Expo store that closed in 2009. The site, a 91,000 sq. ft. store adjacent to the existing Bloom supermarket, is expected to be occupied by the end of 2011.

While not a full-scale redevelopment, this is a significant occurrence due to the significance of the tenant. "General Merchandise Stores," the category of retailers that includes stores such as Wal-Mart, is underrepresented among City businesses. Analyzing retail sales receipts available from the Virginia Department of Taxation, one can see that this category's sales accounted for just under 6 percent of total City taxable sales in 2010, while accounting for over 16 percent of sales in Fairfax County, leading this to be the City's most underrepresented large retail category. The new Wal-Mart Express may well help absorb considerable unmet demand from City consumers, creating a new shopping option for residents while at the same creating new competition for nearby City businesses.

While not a complete redesign and expansion such as with the University Mall, the Wal-Mart re-tenanting will have a significant impact on the City's retail trade area and consumer choices.

Fairfax Corner

One of the most prominent and popular mixed use developments in Northern Virginia is Fairfax Corner, a 417,000-square foot complex of retail, office and restaurants uses located near the Fairfax County Government Center, less than two miles from the City's western boundary.

CIRCLE TOWERS



Images © CB Richard Ellis

Fairfax Corner's current buildings were constructed in the early 2000s, and feature a mixed-use "main street" of one- and two-story buildings, a five-story office building, a cinema, and several restaurant pad sites. The 32-acre site also features a central plaza and plentiful surface parking. Current development density is at a 0.3 floor-area-ratio (FAR), however Fairfax County's Comprehensive Plan specifies a future FAR of between 0.5 and 1.0, depending on the completion of numerous conditions.

Future phases of Fairfax Corner are anticipated to include nearly 700,000 additional square feet of building space, including two multifamily residential buildings, a hotel, three additional retail/office buildings, additional plazas, and several parking garages to replace the existing surface parking. Heights for some of the buildings are planned exceed ten stories. The planned expansion will bring the project to a 0.8 FAR. Although a future Metrorail station

is planned adjacent to the development, the density intensification is proceeding regardless of whether or not the train station comes to fruition.

In its near-decade of operation, Fairfax Corner has become a major regional retail and entertainment center, as well as a relevant example of a vibrant mixed-use center located near Fairfax. As Fairfax Corner expands, it will shift its orientation to a higher-density environment, providing a slightly different example of mixed-use development.

Fair Oaks Mall Redevelopment

In April, 2011, the Fairfax County Board of Supervisors approved a Comprehensive Plan Amendment for the Fair Oaks Mall, one of the region's largest shopping venues. This amendment authorizes a major increase in density on the mall, site, along with a transformation of the mall area into an urban-style mixed use district.

FAIRFAX CORNER



Map & Bottom Right Photo © The Peterson Companies; Top Right Photo © Stoehr Construction

The Plan amendment incorporates several scenarios of varying mass, with the densest scenarios authorized should Metrorail eventually extend further west along I-66. If that rail extension does occur, the total square footage of the mall property is authorized to grow to 4.8 million sq. ft. (up from the current mall's 1.6 million sq. ft.). The buildout without Metrorail would be more modest, but still significant 3.1 million sq. ft. A third scenario, planned for Bus Rapid Transit instead of rail service, would be between the other two scenarios, at 3.8 million sq. ft. At its highest (4.8 million sq. ft.) development level, the mall property's 110-acre site would achieve a floor-area-ratio of 1.0.

The mall itself is envisioned as expanding up to 2 million sq. ft., with the remainder of development coming from other uses, such as apartments or offices. Under the

highest-density Metrorail scenario, the Plan aims for 40 percent of the total 4.8 million sq. ft. to be residential.

Plans to grow the Fair Oaks Mall's size are currently only conceptual, but the scale of such a redevelopment, on a site that is currently a major commercial hub and only two miles from the City, would have implications on the City's commercial and residential sectors.

NORTH OF THE CITY

Tysons Corner Redevelopment

Although 8 miles from the City of Fairfax, the planned redevelopment and intensification of the Tysons Corner area has implications for development throughout Northern Virginia due to the sheer size of the proposed projects.

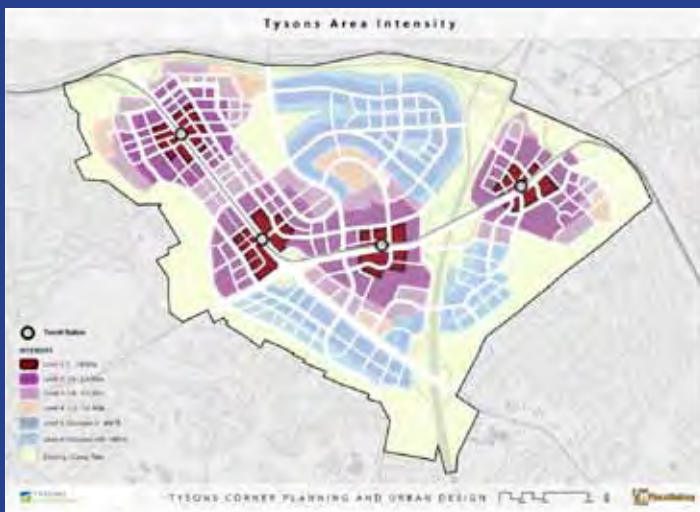
The multi-decade plan to intensify development around Tysons Corner was approved by Fairfax County in 2010, and is envisioned as transforming the area into Fairfax County's "vibrant downtown." The Plan is rooted in high-density mixed-use development, clustered around transit stations and aims to boost both the commercial component of the area as well as the residential component, which is currently relatively small.

The current Tysons Corner area has a heavy concentration of retail and office development and has developed along a lower-density suburban model. The ongoing construction of Metrorail's Silver Line (four stations are expected to open within Tysons Corner by 2014) is being used as the catalyst for that redevelopment.

Containing approximately 2,100 acres, the Plan contains enough development to contain 100,000 residents (up from approximately 17,000 now) and 200,000 jobs (up from 100,000 now) centered around rail stations (75% of all development is slated for parcels within ½-mile of one of the planned stations). It also includes a reworked transportation system centered on a gridded street network with a heavy reliance on mass transit – both the Metrorail and a planned circulator bus system.

Fairfax County anticipates that much of the new development will occur prior to 2030. Building heights

TYSONS CORNER



95% of proposed development in Tysons Corner is within walking distance of transit



Images © Tysons Land Use Task Force

are planned for up to 400 feet in the areas immediately surrounding rail stations, incrementally reducing to lower heights as the distance from the stations increases.

The Tysons Corner Plan essentially creates a new city within Northern Virginia. While not the closest incipient development to the City of Fairfax, Tysons Corner will be closely watched for the foreseeable future for both commercial and residential impacts throughout the region.

SOUTH OF THE CITY

University Mall

The University Mall, just south of the City at Ox and Braddock Roads, is slated to undergo a major renovation within the next two years. The renovation will include adding considerable square footage to the center and re-working the floor plan of the mall to meet modern retail preferences. This includes redesigning the buildings surrounding the mall's courtyard so that the courtyard

becomes more like an open plaza, and by including considerable office space in a addition to the retail space.

The new renovations will add approximately 80,000 sq. ft. of office and retail space to the existing 126,000 sq. ft. shopping center, creating a new center with over 200,000 sq. ft. of space. Meanwhile, the architectural improvements will update the center from its current 1972 architecture.

Traffic and pedestrian improvements will also help to make the mall site more accessible and remove some of the obstacles to ingress and egress. The pedestrian improvements (crosswalks, etc.) aim in part to increase pedestrian connectivity to George Mason University.

Completion of the renovated mall is currently expected in late 2012 or 2013. The expansion and renovation of this mall adds a fresh shopping option for City residents, as well as a new competitor for City shopping centers.

UNIVERSITY MALL



Images © Geo. H. Rucker Realty Corp.



The images above are renderings of the proposed renovation of the University Mall Shopping Center.

CONCLUDING SUMMARY

The City of Fairfax is positioned along the strong development corridors of Route 50, Route 29 and I-66 and enjoys a number of advantages due to its location and established history. The City is a regional hub for retail and office activity, is adjacent to George Mason University, and is close to many existing and planned major employment centers.

Still, the City will see numerous challenges in its effort to remain competitive in a quickly-changing regional atmosphere. In comparison to other areas, the City of Fairfax is under-represented in Class A office space and modern retail centers. While numerous upcoming projects may add competition to the City's existing businesses and developments, they may also add a new market of potential consumers and/or residents who may find the City's unique attributes of small-town charm and historic character to be appealing - thus adding to the City's desirability.

While large development in Northern Virginia has been gradually moving westward for decades, opportunities for redevelopment in the City mean that City properties may be brought up to modern standards in a way that can maintain the City's unique character but still offer amenities and design that can increase the City's regional competitiveness.

From a regional planning perspective, surrounding plans for George Mason University and Fairfax County are generally complementary to the goals of the City's own Comprehensive Plan, even if individual projects may not be appropriate for locations within the City's limits. Adding together the City's prime regional location, its long-standing strengths of strong commercial and residential sectors, and its ability to withstand the current economic crises, Fairfax is well positioned to compete in the years ahead.

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